

## **APPENDIX L**

### **HOUSING CONDITIONS DATA**

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**I. Applicants proposing housing rehabilitation activities must complete and include the Housing Condition Data Summary Form (pages L-2 and L-3 below) in their application.**

Housing conditions data for your project must be summarized on the HOUSING CONDITION DATA SUMMARY FORM (see page L-2 below). MDOC requests that the data submitted by applicants for CDBG housing projects include information only for the proposed project area in order to make housing data included in your application clearly applicable to the project you are proposing.

**Applicants who are proposing housing activities other than housing rehabilitation may also include provide the Housing Data Summary Form in their application** -- if it is applicable to proposed housing activities such as homebuyer assistance, new construction, demolition, clearance, floodplain mitigation, and related neighborhood or community revitalization needs.

**II. Recommended Source for Montana Housing Conditions Data: The Montana Department of Revenue's Property Physical Condition Database (CAMA)**

CDBG applicants are strongly encouraged to use the housing conditions data from the Montana Department of Revenue (DOR) Property Physical Condition Database. The DOR housing conditions resource is called the Computer Assisted Mass Approval (CAMA) database and is on-line at [http://comdev.mt.gov/Co-CityTown\\_Stats\\_Poor-Unsound\\_percentages.xls](http://comdev.mt.gov/Co-CityTown_Stats_Poor-Unsound_percentages.xls) The CAMA database has information regarding the physical condition of residential housing stock for all municipalities in Montana.

MDOC's Community Technical Assistance Program (CTAP), a community planning and technical resource unit of MDOC's Community Development Division, can help you by using GIS technology and public databases (such as the Montana Department of Revenue's database) to create maps identifying critical housing features of your community. See the CTAP website: [http://comdev.mt.gov/CDD\\_ctap.asp](http://comdev.mt.gov/CDD_ctap.asp)

**CDBG applicants should give special attention to those housing units in their community that are classified as "Unsound" or "Very Poor."** Because of the increasing costs associated with rehabilitation relative to the overall market value of a home to be assisted, in some cases it may be more cost-effective for the local program to offer an alternative form of assistance to a homeowner with an "unsound" or "very poor" house, such as voluntary relocation to a home in good condition and demolition of the unsound or poor unit. The DOR's CAMA database provides information regarding the physical condition of residential housing stock in Montana using the following definitions of "Unsound" and "Very Poor":

- **Unsound** – indicates that the dwelling is definitely structurally unsound and practically unfit for use.
- **Very Poor** – indicates that the dwelling is definitely structurally unsound and practically unfit for use. Repair and overhaul is needed on painted surfaces, roofing, plumbing and heating. There is excessive deferred maintenance and abuse. Property is approaching abandonment or major reconstruction.

**Another option for Housing conditions data:** While the use of Montana Department of Revenue CAMA data and corresponding maps is the CDBG-preferred option, there is another option available when applicants are proposing Housing Rehabilitation activities. This other option, a second best choice and less reliable, is to conduct a local housing conditions survey (see page L-4 below). You can also consult an older resource (the 2005 *Montana Housing Condition Study*) that is available from the MDOC Housing Division (841-2820), on-line at [http://housing.mt.gov/Hous\\_CP\\_HsgCondStdy.asp](http://housing.mt.gov/Hous_CP_HsgCondStdy.asp)

**III. See Appendix P, Resources for Evaluating and Meeting Local Housing Needs.**

Appendix P includes: 1) Assistance in Evaluating Local Housing Needs, 2) Economic and Demographic Data Resources, and 3) The Montana Consolidated Plan and Other Housing Resources.

## **HOUSING CONDITION DATA SUMMARY FORM**

(For use with Department of Revenue Data and CTAP Map results  
and with Local Housing Conditions Surveys)

- A. **Number of Project-Area Households:** \_\_\_\_\_
- B. **Number and Percent of LMI Households:** \_\_\_\_\_, \_\_\_\_\_%
- C. **Number and Percent of Owner-Occupied Housing including:**
1. Average or Good Owner-occupied Housing Units \_\_\_\_\_, \_\_\_\_\_%
  2. Fair Owner-occupied Housing Units \_\_\_\_\_, \_\_\_\_\_%
  3. Poor Owner-occupied Housing Units \_\_\_\_\_, \_\_\_\_\_%
  4. Very Poor or Unsound Owner-occupied Housing Units \_\_\_\_\_, \_\_\_\_\_%
  5. If Available, Vacancy Rate for Owner-occupied Housing \_\_\_\_\_, \_\_\_\_\_%
- D. **Number and Percent of Rental Housing Units, including:**
1. Average or Good Rental Housing Units \_\_\_\_\_, \_\_\_\_\_%
  2. Fair Rental Housing Units \_\_\_\_\_, \_\_\_\_\_%
  3. Poor Rental Housing Units \_\_\_\_\_, \_\_\_\_\_%
  4. Very Poor or Unsound Rental Housing Units \_\_\_\_\_, \_\_\_\_\_%
  5. If Available, Vacancy Rate for Rental Housing \_\_\_\_\_, \_\_\_\_\_%
- E. **If Available, Number and Percent of the following:**
1. Elderly Households (households with at least one person **over 62 years**) \_\_\_\_\_, \_\_\_\_\_%
  2. Single Parent Head of Households (household composed of dependents and a single parent as major provider) \_\_\_\_\_, \_\_\_\_\_%
  3. Handicapped Households (households with at least one person with physical or mental handicap) \_\_\_\_\_, \_\_\_\_\_%
- F. **Number and Percent of Structures in the Project Area Appropriate for Demolition:**
- a) Residential \_\_\_\_\_, \_\_\_\_\_%
  - b) Nonresidential \_\_\_\_\_, \_\_\_\_\_%

**G. Housing Project Budget Calculations:**

1. Budgeted Unit Activities:
  - a) Number of Units to be Rehabilitated \_\_\_\_\_
  - b) Number of Structures to be Demolished \_\_\_\_\_
2. Budgeted Estimated Rehabilitation Cost per Unit \$ \_\_\_\_\_  
(See note on lead-based paint remediation costs in Section H below.)
3. Budgeted Administrative and Inspection Cost per Unit \$ \_\_\_\_\_
4. Budgeted Total Cost (#2 + #3) per Unit \$ \_\_\_\_\_
5. Local Estimated Rehabilitation Cost:
  - a) Per Owner-occupied Unit \$ \_\_\_\_\_
  - b) Per Rental Unit \$ \_\_\_\_\_

**H. Meeting HUD's Lead-Based Paint Requirements (for pre-1978 housing, since lead-based paint was banned for residential use in 1978):**

1. Number of pre-1978 constructed residential units in the project area \_\_\_\_\_

**Assure Compliance with HUD Lead-Based Paint Requirements**

Applicants considering housing rehabilitation activities should carefully review the **HUD Lead-Based Paint Requirements**, in Chapter 2 of the CDBG Grant Administration Manual, available at the CDBG website at [http://comdev.mt.gov/CDD\\_CDBG\\_GA.asp](http://comdev.mt.gov/CDD_CDBG_GA.asp)

**Include HUD Lead-Based Paint Remediation and LBP Compliance Costs  
in Your Project Budget**

Budgeted rehabilitation costs presented in *Section G of the form above* should reflect the costs of lead-based paint remediation and compliance with the current HUD rules concerning lead-based paint remediation.

# STRUCTURAL CONDITION SURVEY FORM

**CDBG applicants are strongly encouraged to use the housing conditions data from the Montana Department of Revenue Property Physical Condition Database, but this survey is an option as well.** This Structural Condition Survey Form provides a range of points for housing defects that, when summed, indicates the severity of a housing unit's deterioration, if any. The format is intended for a "windshield" survey of local housing conditions (which does not require inspection of the interior of each housing unit).

The consistent use of the point scores provides a mechanism for assessing each property's condition and tentatively classifying its condition as "standard" or "substandard". Substandard units are further classified by this survey's point system as: 1) those in need of moderate or substantial rehabilitation, and 2) those which are so severely deteriorated that rehabilitation may not be cost effective and the need for demolition of the unit should be considered.

## **A. FOUNDATION**

- |        |   |
|--------|---|
| _____0 | Housing unit has concrete block, concrete, stone or treated wood foundation with only minor cracks or spalling (flaking, chipping or splintering) evident. No severe sagging or other noticeable support defects. |
| _____2 | Foundation has holes in a few places, major cracks or spalling evident. Severe sagging or other major support defects.  |
| _____6 | Housing unit has some sections of main living areas which do not have an approved foundation, or has major holes in the foundation providing little protection from elements (rain, snow).                        |

## **B. WALLS / PORCHES / STAIRS**

- |        |   |
|--------|---|
| _____0 | Exterior walls, porches or stairs in good shape (effective protection from elements).   |
| _____2 | Some porches or stairs out of alignment, sagging, or buckling outward. Siding loose; paint chipping or worn away in major areas. Mortar decomposing in brick or stone structures. Stucco or plaster badly cracked.                                      |
| _____6 | Some exterior walls, porches or stairs badly aligned, sagging, or with holes. Siding missing, or building materials in advance stages of deterioration. Mortar missing, bricks or stones loose or missing. Stucco or plaster missing or badly spalling. |

## **C. WINDOWS / DOORS**

- |        |   |
|--------|---|
| _____0 | Exterior window and door features in good shape.  |
| _____2 | Exterior windows and doors need minor caulking or repairs or storm windows. Existing storm windows in deteriorated condition. Window panes cracked; single glazing or plastic vinyl weatherizing. |
| _____6 | Exterior windows and doors broken, large cracks, holes, missing parts; needs major repair.  |

## **D. ROOF**

- |        |   |
|--------|---|
| _____0 | Roof line straight with no sagging evident. Roofing materials in good shape.                              |
| _____2 | Roof line slightly sagging. Roofing materials loose, few missing shingles or portions loose or missing.   |
| _____6 | Roof line sags extensively. Roofing materials missing, holes evident, flashing missing or rusted through. |

## **E. CHIMNEY / VENTS**

- |        |  |
|--------|--|
| _____0 | Chimney/vents in good shape; chimney adequately projects above roof (3 ft. or more).   |
| _____2 | Metal chimney/vents out of alignment, some rusting or evidence of deterioration. Evidence of loose bricks or deterioration of mortar in masonry chimney. |
| _____6 | Chimney/vents in need of major repairs or replacement; vents missing.  |

**F. ELECTRICITY** Current state standards for electrical service require:

1. Proper weather protection at entry to the housing unit which includes a weather cap on top of a conduit mast.
2. Attached to the base of the conduit mast a large square meter base, with the meter mounted on it.
3. An 8-foot ground rod from the bottom of the meter base to the ground.

\_\_\_\_\_0 Adequate service: Wires to unit appear to be of good quality and condition. Weather protection at entry, meter mounted to meter base. Proper grounding.

\_\_\_\_\_2 Questionable service: Wires to unit appear to be worn. Deteriorated weather protection and/or meter base. Inadequate grounding.

\_\_\_\_\_6 Inadequate service: No electricity to housing unit. Hazardous wires to unit. No weather protection or meter base. No grounding evident.

\_\_\_\_\_ **TOTAL POINTS** (Total of A through F)

**Point Deduction Guidelines**

**0 - 7 points: STANDARD** -- Housing unit appears to be in acceptable condition.

**8 -15 points: MODERATELY SUBSTANDARD** -- Unit needs moderate repair and rehabilitation appears appropriate.

**16 - 23 points: SUBSTANTIALLY SUBSTANDARD** -- Unit appears to need substantial repair. (Rehabilitation may not be cost-effective. Alternative forms of assistance may be more appropriate.)

**24+ points: SEVERELY SUBSTANDARD** -- Unit appears dilapidated. Demolition and housing replacement should be considered.

Type of structure: Single family, detached\_\_\_\_\_

Duplex\_\_\_\_\_

Other (specify) \_\_\_\_\_

\_\_\_\_\_

Address of housing unit: \_\_\_\_\_

Date Surveyed: \_\_\_\_\_

Surveyor: \_\_\_\_\_

**As an alternative to reprinting a number of survey forms**, the person conducting the survey may record the points for each category and the total score, along with the type of structure and the address of the housing unit on a 3 x 5 inch index card or other recording chart.

**When paired with data from a local household income survey (see Criterion 4), the information could also be used to note whether the household would or would not be eligible for assistance.**